Identity Enrollment and Credentialing User Manual

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Avigilon Inc.
Box 378
#101-1001 West Broadway
Vancouver, British Columbia
V6H 4E4
Canada

Phone:888.281.5182
Web:www.avigilon.com

Getting Help

If you encounter a problem that is not discussed in available Access Control Manager user guides or on-line help files, and need technical support, please contact your local Value Added Reseller (VAR) or Access Control Manager provider.

When contacting your VAR, please be sure to have your software version number available.

For future reference, record these numbers here.

Version Number: _____

VAR: _____

VAR Phone #: _____

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Identity Enrollment and Credentialing

This short guide provides the necessary information you need to enroll users and issue credentials using this Access Control Manager.

This feature enables you, the operator, to enroll users and issue credentials to all employees and other qualified individuals requiring access to the facility controlled by this Access Control Manager Appliance.

The enrollment and credentialing feature involves these procedures:

- Opening the feature
- Enrolling a person or credential
- Creating a profile and applying it to an individual identity
- Printing a badge
- Designing a badge template

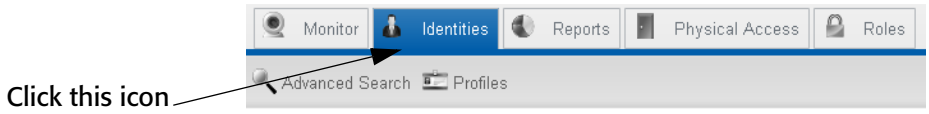
Opening the Identities Feature

To use the Identities feature, follow these simple instructions:

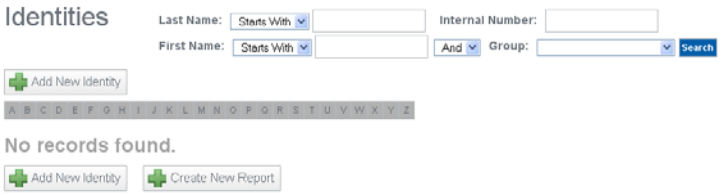
1. If closed, open the Access Control Manager.

   If already open, skip to Step 2.

2. At the Access Control Manager home page, click the **Identities** icon from the main icon task bar.

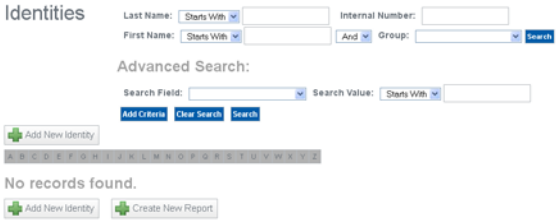


   The Identities listing page appears like this example:

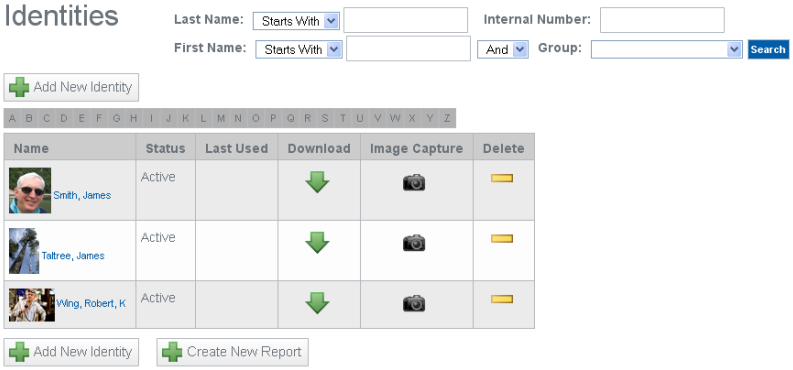


   This page provides a quick search section that enables the qualified operator to find one or more identities for editing.

If a more advanced search is required, click the Advanced Search sub-option and an additional section list this example appears:



Once you have clicked a relevant alphabetic tab, or specified a search term and clicked Search, a list of applicable identities appears like this example:



Identities

The Identities feature is used to enroll employees and all other workers and service personnel who require access to a facility or location maintained and overseen by the Access Control Manager system.

Adding Identities

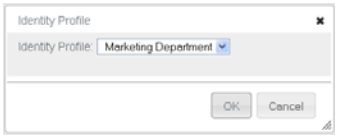
To add a new Identity:

1. From the home page icon task bar, click **Identities**.

   The Identities Listing page appears like this example:

2. Click the Add New Identity button.

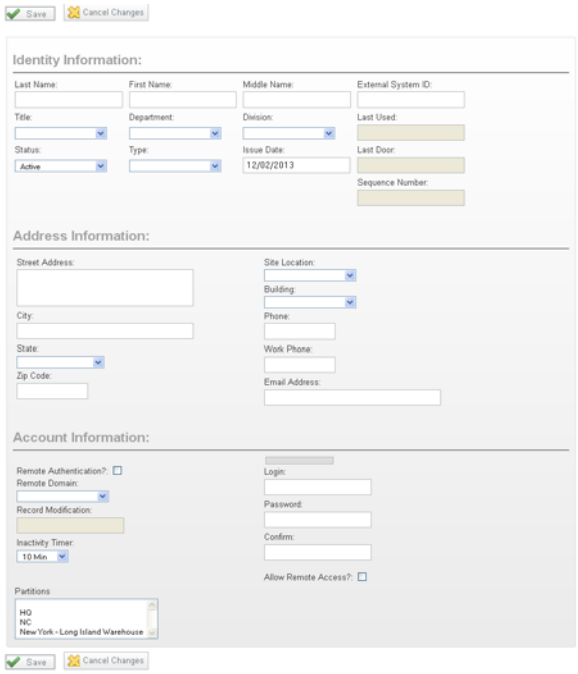
The Identity Profile dialog box appears like this example:



Only those identity profiles already defined for this system appear in this list. For more on defining profiles, refer to *Identity Profiles* on page 39.

3. Do one of these:
   - If you have defined one or more profiles for this system, select the profile you want from the 'Identity Profile' pick list then click **OK**.
   - If no profiles have been defined for this system or you want to bypass assignment of profile values for this identity, click **Cancel**.

   The Identity Add page appears like this example:

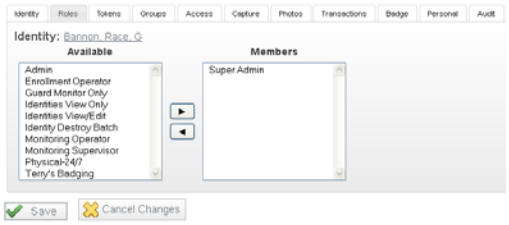


   For a full description of the fields and buttons that appear on this page, refer to *Identity Page* on page 17.

4. Fill out the fields on this page as required.

5. When you've filled out the required field, click the Save button.

The Identities tab appears with the Roles page displayed like this example:

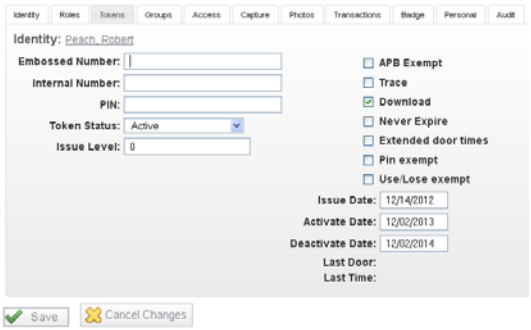


6. Select the roles to which this person is a member.

   For a full description of the fields and buttons that appear on this page, refer to *Roles Page* on page 20.

7. Click the **Tokens** tab.

   The Tokens page appears like this example:

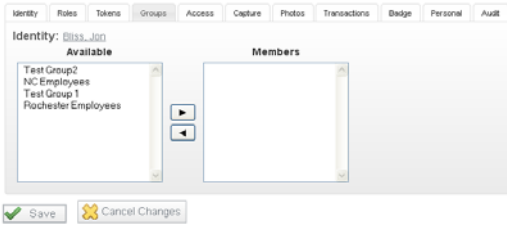


   The fields on this page are explained in *Tokens Page* on page 21.

8. Customize tokens for this identity as required.

9. Click the **Groups** tab.

   The Groups page appears like this example:



10. Assign groups to this person as required.

    For a full description of the fields and buttons that appear on this page, refer to *Groups Page* on page 22.

11. Click the **Access** tab.

    The Access page appears like this example:

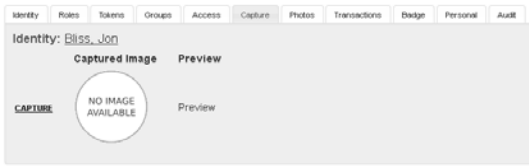
12. Review the roles that this person can currently access and the doors that these roles support.

    If necessary, you can return to the Roles page and redefine the roles this person is assigned.

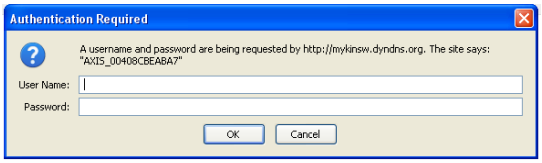
    For a full description of the fields and buttons that appear on this page, refer to *Access Page* on page 23.

13. Click the **Capture** tab.

    The Capture page appears like this example:



    If the capture device has been secured by a user name and password, this page will not appear until you have supplied the required values to the authentication prompt like this:



    Supply the required user name and password then click **OK** and the Capture page should appear.

14. To capture a picture from this page using a previously attached and configured camera:

    a. Click on the **Capture** link next to the identity that requires a photo.

       The connected capture device takes a picture of the designated person and places it on the Capture page.

    b. To create additional pictures, repeat Step b.

    c. To view all captured pictures for this person, click on the person's name.

       The Identities Edit screen appears.

    d. Select the **Capture** tab to view the Identity Capture page.

    e. Click to select the image you want to use for the person.

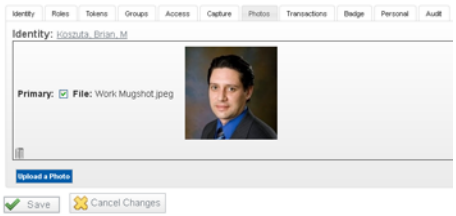
    f. Click

to save this image.

    For a full description of the fields and buttons that appear on this page, refer to *Capture Page* on page 24.

15. Click the **Photos** tab.

The Photos page appears like this example:

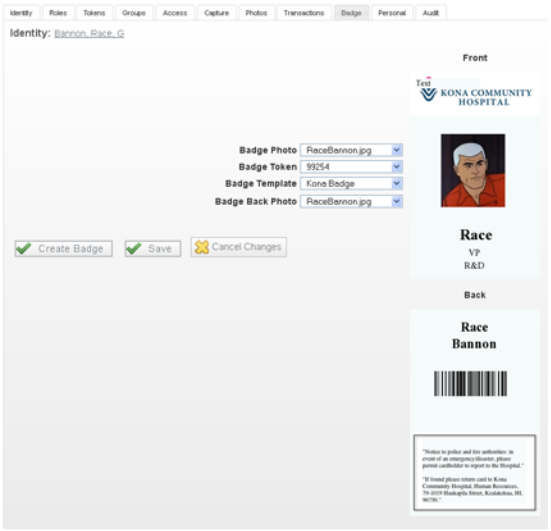


16. Upload required photos of this person.

    For a full description of the fields and buttons that appear on this page, refer to *Photos Page* on page 24.

17. Click the **Badge** tab.

    The Badge page appears like this example:



18. Enter the required fields.

    For a full description of the fields and buttons that appear on this page, refer to *Badge Page* on page 26.

19. To print a badge, click the Create Badge button.

    A badge for this person is printed to the designated badge printer.

20. When you're finished, click Save .

21. Click either the **Identities** > linked bread crumb above the page or click Cancel Changes .

You are returned to the Identities Listing page.

Searching for Identities

Often there are far too many people in a Access Control Manager database to allow for quick identification.

To aid in finding a particular individual in the database, this application includes a robust search feature.

There are two types of identity database searches you can perform:

- Quick search
- Advanced search

Quick Search

To perform a quick search for an existing identity:

1. In the 'Last Name' text box, enter the last name of the person you are looking for.

   If required, in the 'First Name' text box, enter the first name of the person you are looking for.

   If required, in the 'Token' text box, enter the internal number of the identity you are seeking. In whichever field you type, the program will attempt to assist you by finishing your search term with an existing name or token, such as if you are placed a wildcard after your entry.

2. In the pull-down box to the right of these three boxes, select whether the values entered in the Last Name, First Name, and Token fields should be combined into a single search criteria (And) or used as separate search criteria (Or).

   If the And value is selected, only those identities to fit all entered conditions will appear. If the Or condition is selected, each entered value is employed as a separate criteria.

   For example, if you entered Smith in the 'Last Name' field and William in the 'First Name' field, selecting And as your condition instructs the application search engine to find only those identities in the database that are named William Smith. If you select the Or condition instead, all identities that have the last name of Smith or the first name of William are listed.

NOTE: At any point, you can clear values you have already entered and start over by clicking the Clear Search.

3. Click Search.

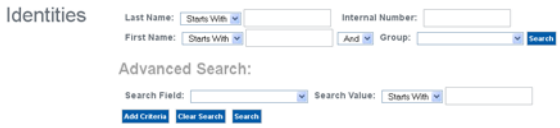
   The search engine processes the request and displays all people in the database who fit the entered information.

Advanced Search

To specify a still more selective search:

1. Click the Advanced Search sub-option (that appears below the Identities option in the icon task bar) and above the Listing page.

The page expands to include the search criteria fields like this example:



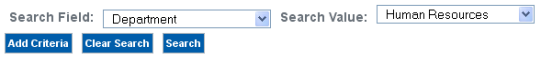
2. In the 'Search Field' pick list, select one of the existing fields whose value you want to specify.

   Only those fields that appear on the Identities Edit Properties screen are included in this list.

3. In the 'Search Value' text box, enter a value or select a valid option for the selected search field.

   Only those values specific to the selected field appear in this list.

   For example, if you selected **Department** as the search field, you would see these options as possible search values:



4. If you need to specify one or more additional criteria for this advanced search, click the **Add Criteria**.

   Another row of fields appear like this example:

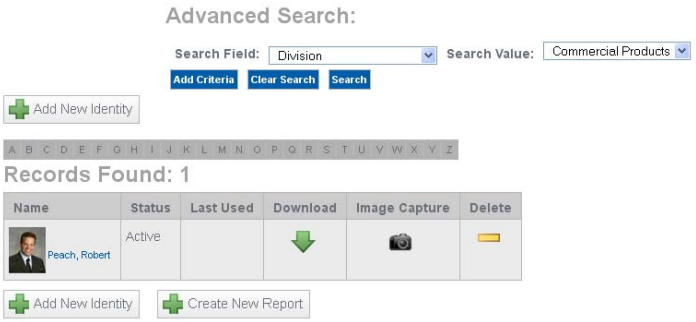
5. Repeat Steps 3 - 4 to specify one or more additional criteria, then select the condition the search engine will use for using the multiple criteria.

   If the And value is selected, only those identities to fit all entered criteria will appear. If the Or condition is selected, each entered criteria is employed as a separate search term as in the following example:

NOTE: At any point, you can clear values you have already entered and start over by clicking **Clear Search**. To clear a single criteria in a multiple entry, click **Remove**.

6. When you have specified all of the criteria you require including the condition (And/Or) under which they will be used, click **Search**.

The search engine processes the request and displays all people in the database who fit the entered information and the results appear like this example:



7. To clear the results on the screen, click **Clear Search** .

Assigning Badge Templates

Many users require a badge of some sort.

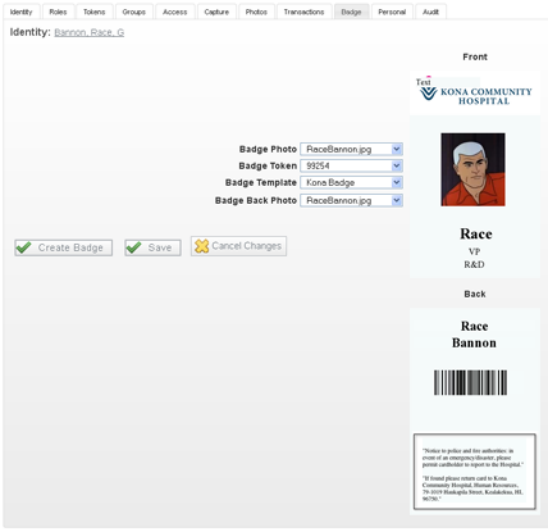
To assign a badge template to a user:

1. At the Identities Listing page, click to select the user name to whom you want to assign a badge.

   The Identities Edit page appears.

2. Click the **Badge** tab.

   The Badge page appears like this example:



3. At the 'Badge Photo' pick list, select the photo you want to appear on this badge.

   Only those photos previously uploaded or captured can appear in this list.

4. At the 'Badge Token' pick list, select the token you want to associate with this badge template and user.

Only those tokens previously defined for this user appear in this list.

5. At the 'Badge Template' pick list, select the badge template you want to assign to this user.

   Only those badge templates previously defined for this user appear in

   this list.

   For more on creating badge templates, refer to *Identities* on page 2.

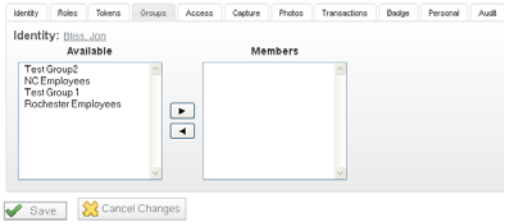
6. Click Save to save this badge.
7. Print the badge at the designated badge printer.

Assigning Groups to Identities

To assign a group to an identity:

1. From the Identities edit properties screen, click on the **Groups** tab.

   The Groups page appears like this example:



2. Using the ▶ button, move groups as required from the Available window to the Members window.
3. When you're finished, click Save .

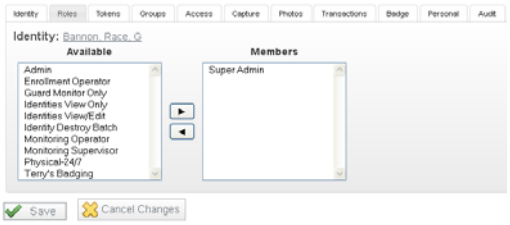
For definitions on the fields and buttons appearing on this page, refer to *Groups Page* on page 22.

Assigning Roles to Identities

To assign roles to an identity:

1. At the extended Identity property page, click on the **Roles** tab.

   The Roles page appears like this example:



2. If needed, enter the search criterion in the 'Search' box and click Filter .

The Available window is populated with the roles fitting the search criterion.

3. Click to highlight one or more roles that you want in the Available window then click the ► button to move roles to the Members window.

4. When you're finished, click Save .

For definitions on the fields and buttons appearing on this page, refer to *Roles Page* on page 20.

Capturing Images for Identities

Use an attached and previously configured camera to capture an image for inclusion in the user's database or with placement on a badge.

NOTE: Before you can capture an image you must first connect an approved camera to the system, then configure the device using the External Devices feature.

To capture an image from the individual identity:

1. From the Identities Listing page, select the identity you need.

   The Identity properties screen appears.

2. Click the **Capture** tab.

   The Capture page appears.

3. Click the CAPTURE link.

   The connected capture device takes a picture of the designated person and places it on the Capture page.

4. When you're finished, click Save to save this image.

To capture an image for an identity from the Identities Listing page:

1. Open the Identities Listing page.

2. Click on the Image Capture button next to the identity that requires a photo.

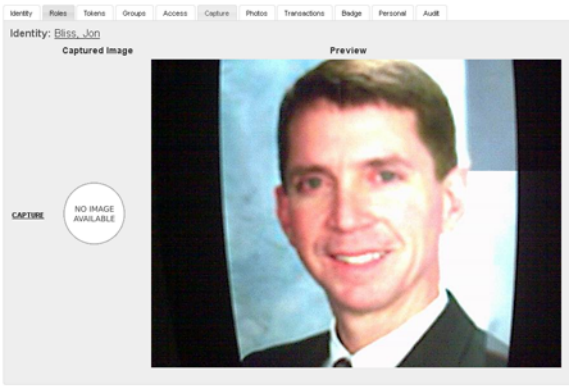
   The connected capture device takes a picture of the designated person and places it on the Capture page.

3. To create additional pictures, repeat Step 2.

4. To view all captured pictures for this person, click on the person's name.

   The Identities Edit screen appears.

5. Select the **Capture** tab to view the Identity Capture page like this example:

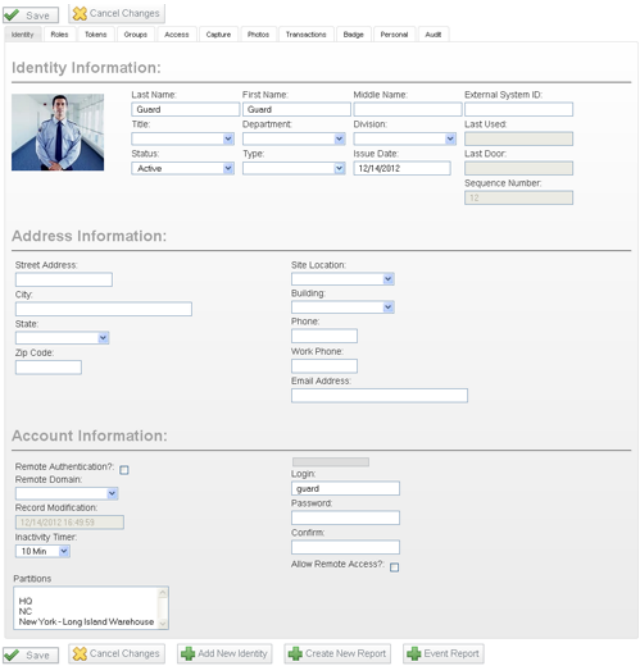


6. Click to select the image you want to use for the person.

   To capture a new image, click the CAPTURE link. The image of the person in front of the connected camera is captured.

7. Click Save to save this image.

   The image now appears on the Identity page like this example:



NOTE: If the picture does not instantly appear, right click on the image frame and select **Show Picture** from the pop-up option list.

For definitions on the fields and buttons appearing on this page, refer to “Capture Page” starting on page 24.

Uploading an Existing Image

Photos can be placed in a user's Identities database in one of two ways:

- An existing photo can be uploaded.
- A user's photo can be taken (captured).

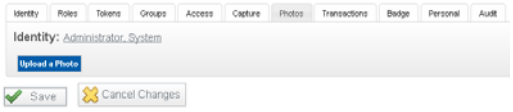
Before you download a photo, make sure it is an appropriate size and definition.

Most badge photos are no more than 2 x 3 inches. Standard photos should be decreased in size in order to fit in the standard format.

To upload an image for a badge or identity record:

1. From the Edit Properties screen, click on the **Photos** tab.

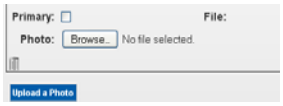
   A screen like this example appears:

   If no camera has been defined, a message appears at the top of this page as shown in the above example. If a capture device is currently in place, no message appears.

2. Click the Upload a Photo button.

   The screen expands to include two fields like this example:

3. At the Photo text box, either enter a file name complete with path, or click the Browse... button and, using the Choose File dialog box, navigate to the directory and file containing the image you want to upload.
4. Click **Open** to confirm the choice.
5. If this is the primary photo to be used for this person, click to check the Primary box.
6. If you need to upload another photo, repeat Steps 2 through 4.
7. When you're finished, click the Save button.

The uploaded photo is saved to the Photos page.

For definitions on the fields and buttons appearing on this page, refer to *Photos Page* on page 24.

Creating and Assigning Identity Tokens

Tokens are cards or codes that are assigned to a system user that enables them to access designated areas. There can be more than one token assigned to each employee, since there can be more than one badge or PIN assigned to an employee.

To create one or more tokens and assign them to badges:

1. From the Identities Listing page, click the name of the user to whom you want to assign tokens.

   The Identity property sheet for that user appears.
2. Click the **Tokens** tab.

   The Tokens page appears.
3. Click

.

   The Add Token page appears.
4. Fill out the fields as required.
5. When you're finished, click

.

   The new token is added to the user's identity properties.

   The

button appears.
6. Click the

button to download this token to the connected panels and associated doors.
7. To create additional tokens, repeat Steps 2 through 5.
8. Click the **Badge** tab.

   The Badge page appears as shown in *Badge Page* on page 26
9. At the Token pick list, select the token number you want to assign to this badge.

For definitions on the fields and buttons appearing on this page, refer to *Tokens Page* on page 21.

Printing Badges

Before you can print a badge, you must first have connected a badge printer to the client's network and configured it properly (installing the correct printer driver). For more on this, refer to the printer's user guide.

To print a badge:

1. Add a person to the Identities database.

   Alternatively, click the select an existing person from the Identities Listing page.
2. From the Identities Edit Properties screen, click on the **Badge** tab.

   The Badge page appears.
3. Fill in the fields as required.
4. When you're finished, click

.
5. Click

.

   The badge appears in a preview window.

6. From the browser menu bar, select **File** > **Print** (or press **Ctrl** + **P**) and specify the connected badge printer.

The Badge is printed.

For definitions on the fields and buttons appearing on this page, refer to *Badge Page* on page 26.

Editing Existing Identities

To edit an existing Identity:

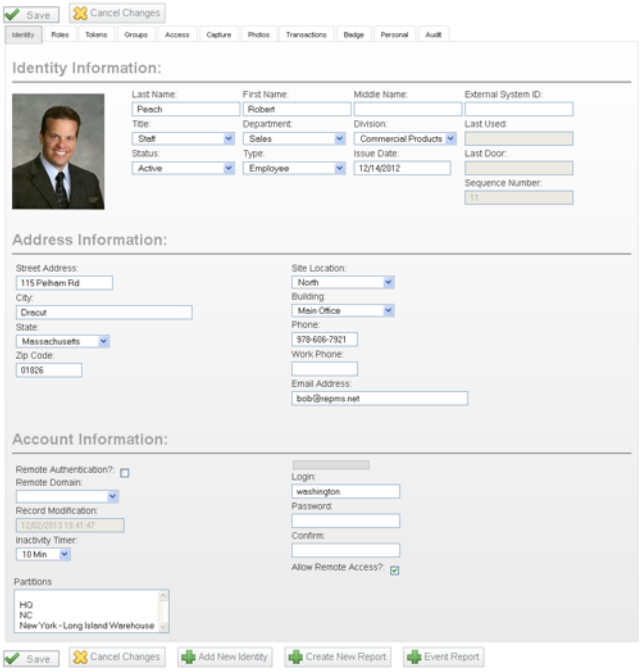
1. From the main menu, click **Identities**.

   If the name does not appear, search for the identity as described in *Searching for Identities* on page 7.

   The Identities Listing page appears like this example:

2. Click the name of the identity you want to edit.

   The Identity Edit screen appears like this example:



3. Modify the fields on each tabbed page as required.

4. When you've made the required changes to a page, click the Save button.

   For additional information on each of these pages refer to *Adding Identities* on page 2 or consult Access Control Manager online help for additional information.

5. To print a badge, click the Create Badge button.

   A badge for this person is printed to the designated badge printer.

6. Click either the **Identities** > linked bread crumb above the page or click Cancel Changes .

You are returned to the Identities Listing page.

Deleting One or More Identities

To delete an existing identity:

1. From the Identities Listing page, click to the right of the person you want to delete.

   A message appears asking you to confirm your selection.

2. Click **OK**.

The person is removed from the list.

Bulk Delete Feature

The Access Control Manager offers a bulk delete feature for eliminating unwanted or expired identities from the system.

Caution — This feature has the potential to completely delete the identity database and should only be used by a top-level administrator. Only those individuals assigned the 'Identity Destroy Batch' in Delegation can use this feature.

To delete a group of identities from the search list:

1. Perform an advanced search to find all those identities that should be deleted from the system.

   For more on this, refer to *Searching for Identities* on page 7.

2. Click Search to display all of the specified names in the list.

3. Click the Destroy Batch button.

   You are queried to confirm your choice.

4. Click **Yes**.

All of the identities in the list are deleted from the system.

Identity Pages Field Descriptions

This section defines the fields and buttons that appear on each Identity page. These pages include:

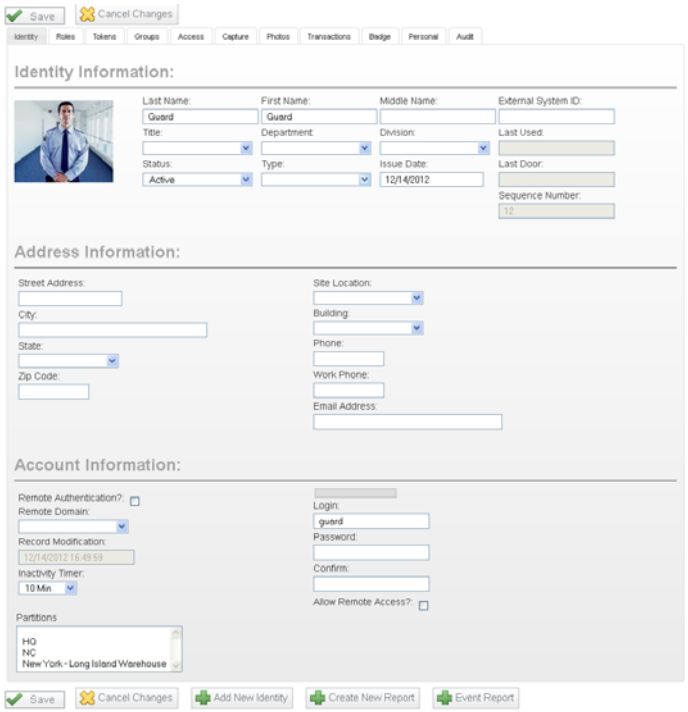
- Identity
- Roles
- Tokens
- Groups
- Access
- Capture
- Photos
- Transactions
- Badge
- Audit

In addition to these tabbed pages, a qualified operator can also create additional pages through the User Defined option. For more on this, refer to “User-Defined Fields - Adding a Tabbed Page” in Access Control Manager online help.

The following pages describe the default pages in more detail.

Identity Page

When you click the **Identity** tab on the Identities screen, a page like this example appears:



This page contains the following fields and buttons:

Identity Information	
Photo	If you have either imported an image or captured an image for this identity, the photograph appears to the left of the Identity Information fields.
Last Name	Enter the last name of the user. This field is required.
First Name	Enter the first name of the user. This field is required.
Middle Name	Enter the middle initial.
External System ID	Enter the ID used by the company or issuer of the badge to indicate this unique user.
Address	Enter the address of the user.
Title	From the drop-down list, select the title of this user. To define more options, refer to “User-Defined Lists - Adding Items” in Access Control Manager online help.
Department	From the drop-down list, select the department to which this user is affiliated. To define more options, refer to “User-Defined Lists - Adding Items” in Access Control Manager online help.
Division	From the drop-down list, select the company division with which this user is affiliated.
Last Used	Indicates the time required for access (or attempted access) at the last door where the user presented their card.
Status	Select the option from the pick list that describes the current status of this new user. **Active** - this is a current user. Expired - this user's access has expired. **Lost** - this user's access card/badge is reported lost. **Stolen** - this user's access card/badge is reported stolen. This field is required.
Type	From the drop-down list, select the type of identity this is. Default values include **Employee**, **Contractor**, and **Visitor**. To define more options, refer to “User-Defined Lists - Adding Items” in Access Control Manager online help.
Issue Date	Specify the date this identity was issued. Click in the field to bring up and use the calendar.
Last Door	Indicates the last door this identity accessed.
Sequence Number	Indicates the sequence number assigned by the system to this individual. The initial count of this number is specified in the System Settings.
Address Information	
Street Address	Enter the address of the user.
City	Enter the city where this user lives.
State	Enter the state where the user lives.

Zip Code	Enter the zip code where the user lives.
Site Location	From the drop-down list, select the location where this user works. To define more options, refer to “User-Defined Lists - Adding Items” in Access Control Manager online help.
Building	From the drop-down list, select the building where this user works. To define more options, refer to “User-Defined Lists - Adding Items” in Access Control Manager online help.
Phone	Enter the phone number this user has. This can be either cell phone or home phone.
Work Phone	Enter the phone number where this user works.
Email Address	Enter the user's email address.
Account Information	
Remote Authentication?	Check this box to indicate that this identity can access this system remotely. The password and confirm fields disappear. Remote authenticate is achieved by defining a default domain and server from the Remote Authentication page.
Remote Domain	From the drop-down list, select an external domain (a domain outside this security system) from which this identity can seek authentication. Only those external domain previously defined by the system appear in this list.
Record Modification	This read-only field indicates the last time and date this user's identity was modified.
Inactivity Timer	From the drop-down list, enter the number of minutes this user's activities can remain unrecorded before the user is logged out of the application.
Password Strength	Below the password field a bar indicates how the system judges the strength of the password you have entered above.
Login	Enter the name this user will use to log in to the Access Control Manager.
Password	Enter the password this user will use to log into the Access Control Manager. A minimum of four characters is required.
Confirm	Enter the same password to confirm the selection.
Allow Remote Access?	Check this box to allow a specific identity remote access to the Postgres (transaction) database.
Partitions	Select one or more partitions from the list. Only those selected partitions can access this page. Only those partitions previously defined for this system appear in this window.

If an image of the person has been captured or uploaded, it appears in a frame to the right of the fields, as shown in the above example.

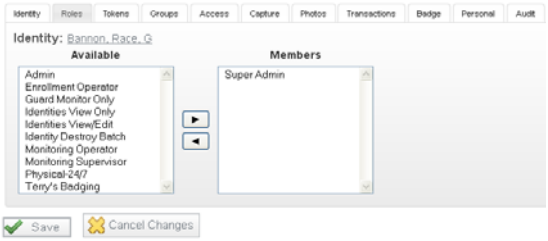
In addition, there are five buttons at the bottom of this page:

	Click this button to save the current settings.

Cancel Changes	Click this button to exit this page and return to the higher level screen.
Add New Identity	Click this button to open the Identity Add page and add a new person to the database.
Create New Report	Click this button to generate a quick PDF report on this specific identity.
Event Report	Click this button to generate a quick spreadsheet report on this specific identity.

Roles Page

When you click the **Roles** tab on the Identities screen, a page like this example appears:

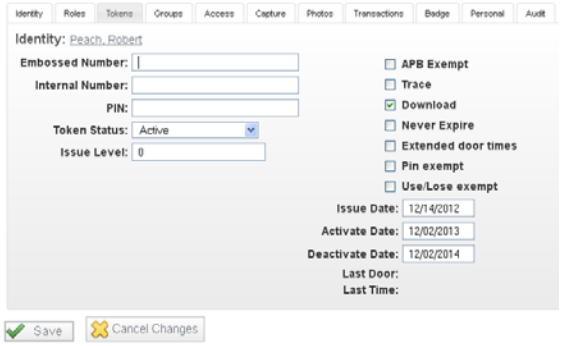


This page includes the following fields:

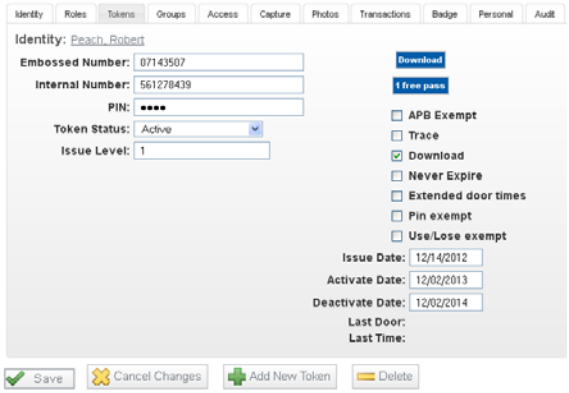
Available	This window contains the available roles defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the Members window, click to highlight one or more terms then click the ▶ button.
Members	This window contains all roles that are associated with this identity. To add a role to this window, select to highlight one or more terms from the Available window then click the ▶ button. To remove a term from this window, select to highlight the term then click the ▶ button.
Save	Click this button once you've selected all of the roles you want to save your selections.
Cancel Changes	Click this button to ignore changes made to this page and return to the Identities Listing page.

Tokens Page

When you click the **Tokens** tab initially, a page like this example appears:



Once you have defined and saved a token, the page changes to include the buttons in this example:



The fields and buttons on this page include:

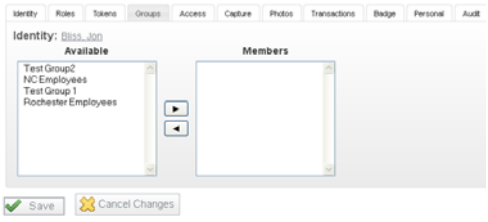
Embossed Number	Enter the number embossed on the card that will be issued to this user. This is only required if a physical card is being issued.
Internal Number	Enter the actual number encoded on the ID card.
PIN	Enter the number this card requires to be entered at a reader in order to grant access to this user or perform the function for which the token was created. This number is only required if a keypad entry is necessary.
Status	From the pick list, select the current status option of the token assigned to this identity.
Issue Level	From the pick list, select the issue level this token possesses. The range is 0 to 9 where 0 is no issue level and 9 is the highest possible issue level.
Download	Click this button to download this token to all connected panels. This button only appears after the token has been saved.
1 free pass	Click this button to grant the person assigned this token one free pass through a door. This button only appears after the token has been saved.
APB Exempt	Check this box to designate that this token is exempted from the use of anti-passback at doors or access points where APB is normally enforced. This is generally used for executive override.

Trace	Check this box to enable tracing when this token is used.
Download	Check this box to enable downloading of this token. This feature is checked and enabled by default.
Never Expire	Check this box to indicate that this token never expires.
Extended door times	Check this box to indicate that this token can use extended door times. This is particularly useful for token holders with special needs.
Issue Date	Click inside this field and use the calendar to specify the date when this token is issued. Alternatively, enter the date using the keyboard.
Activate Date	Click inside this field and use the calendar to specify the date when this token is activated. Alternatively, enter the date using the keyboard.
Deactivate Date	Click inside this field and use the calendar to specify the date when this token is deactivated. Alternatively, enter the date using the keyboard.
Last Door	Indicates the last door at which this token was used to gain access.
Last Time	Indicates the last time this token was used to gain access.
Save	Click this button to save the current settings.
Cancel Changes	Click this button to exit this page and return to the higher level screen.
Add New Token	Click this button to create and assign a new token for this user. A user can possess more than one token.
Delete	Click this button to delete the current token and disassociate it from the designated user.

The rest of the fields on this page are described on the Identity page.

Groups Page

When you click the **Groups** tab on the Identities screen, a page like this example appears:



This page is used to assign various security system components, such as doors and identities, to a specific group. The fields on this page include:

Available	This window contains the available policy groups defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the Members window, click to highlight a term then click the ▶ button.
Members	This window contains all policy groups that are associated with this identity. To add a group to this window, select to highlight a term from the Available window then click the ▶ button. To remove a term from this window, select to highlight the term then click the ◀ button.
Save	Click this button once you've selected all of the groups you want to save your selections.
Cancel Changes	Click this button to ignore changes made during the present session and return to the previous page.

Access Page

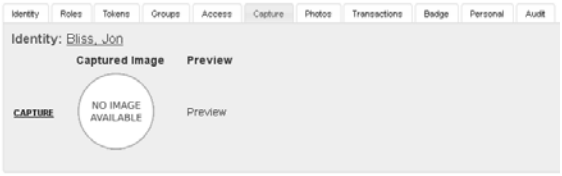
When you click the **Access** tab on the Identities screen, a page like this example appears:

The fields on this page are:

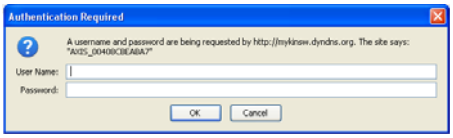
Identity	The identity of the currently selected person. To view the Identity page, you can click this linked name.
Roles	A list of all roles to which this person is associated. To view an individual role, click on the role name and the Roles property sheet appears.
Access Groups	A list of all access group with which this person is associated. To view an individual access group, click on the group name and the Access Group property sheet appears.
Doors	A list of doors this person is allowed to access. To view properties for a specific door, click on the door name and the Door property sheet appears.

Capture Page

When you click the **Capture** tab on the Identities screen, a page like this example appears:

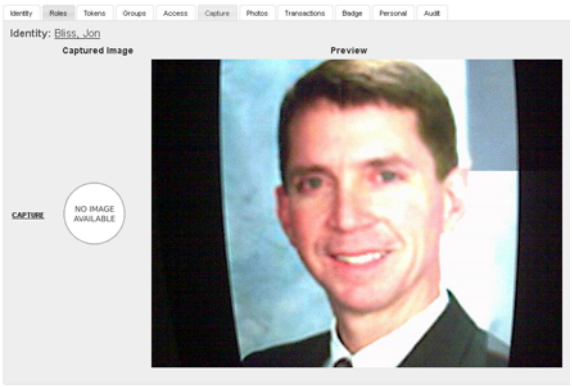


If the capture device has been secured by a user name and password, this page will not appear until you have supplied the required values to the authentication prompt like this:



Supply a user name and password, then click **OK**, and the capture page should appear.

To capture a picture for this identity, click the **CAPTURE** link. If there is a camera configured for this system and a face ready to be captured, an image appears. If an image has already been captured, it appears where the NO IMAGE AVAILABLE frame appears at default, like this example:

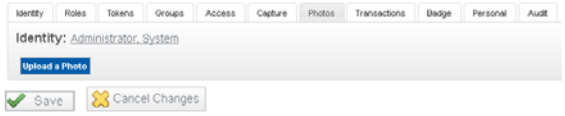


If there is no capture device currently defined for this system, a message appears saying “Capture Failed”.

Use this page to examine existing captured images and add to them as required. For more on adding images, refer to *Capturing Images for Identities* on page 11.

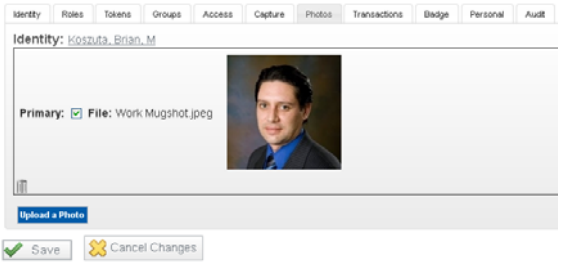
Photos Page

When you click the **Photos** tab on the Identities screen, a page like this example appears:



This page includes a single button, Upload a Photo, that enables the operator to upload an existing photograph of the user.

Once a photograph is uploaded, the page changes to look like this example:

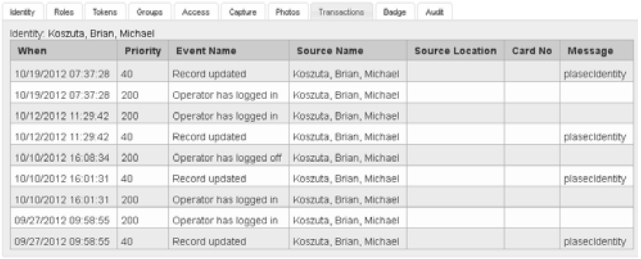


This page includes these fields and buttons:

Primary File	Check this box to indicate that the currently displayed photograph is the photo that will appear in the badge template photo box assigned to the primary photo. Only the primary photo appears on the Identity page.
	Click this button to delete the currently displayed photograph.
	Click this button to upload one or more additional photos.
	Click this button once you've finished to save your selections.
	Click this button to ignore unsaved changes made to this page and return to the Identities Listing page.

Transactions Page

When you click the **Transactions** tab on the Identities screen, a page like this example appears:


Identity
Roles
Tokens
Groups
Access
Capture
Photos
Transactions
Badge
Audit
Identity: Koszuta, Brian, Michael
When
Priority
Event Name
Source Name
Source Location
Card No
Message
10/19/2012 07:37:28 40 Record updated Koszuta, Brian, Michael plaseclidentity
10/19/2012 07:37:28 200 Operator has logged in Koszuta, Brian, Michael
10/12/2012 11:29:42 200 Operator has logged in Koszuta, Brian, Michael
10/12/2012 11:29:42 40 Record updated Koszuta, Brian, Michael plaseclidentity
10/10/2012 16:08:34 200 Operator has logged off Koszuta, Brian, Michael
10/10/2012 16:01:31 40 Record updated Koszuta, Brian, Michael plaseclidentity
10/10/2012 16:01:31 200 Operator has logged in Koszuta, Brian, Michael
09/27/2012 09:58:55 200 Operator has logged in Koszuta, Brian, Michael
09/27/2012 09:58:55 40 Record updated Koszuta, Brian, Michael plaseclidentity

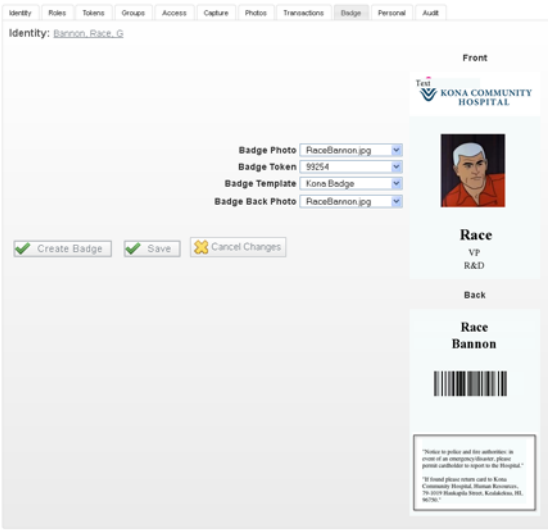
This page enables the qualified operator to review past alarms and events that this identity has caused. The information in this table is listed by these columns:

When	The date and time when this event occurred.
Priority	The importance of this event where 0 is least important and 99 is most important. Priority numbers are assigned through the 'Priority' text box on the Events Add page.
Event Name	The name of the event. Names are specified in “Events - Adding” in Access Control Manager online help.
Source Name	The name of the person causing the event. This name is assigned to the token that caused the event as specified in “Identities - Adding” in Access Control Manager online help.

Source Location	Displays the location where this event or alarm occurred.
Card No	If this token was assigned to a card, this displays the card number.
Message	This displays the message associated with the event. Messages are assigned through the Events Add page.

Badge Page

When you click the **Badge** tab on the Identities screen, a page like this example appears:



This page contains the following fields:

Badge Photo	Select the picture to assign to this page. Only those pictures previously captured or uploaded appear in this list. For more on these topics, refer to *Capturing Images for Identities* on page 11 and *Uploading an Existing Image* on page 13.
Badge Token	Select a token to associate with this badge. Only those tokens previously defined by the system appear in this list. For more on creating tokens, refer to *Creating and Assigning Identity Tokens* on page 13.
Badge frame **Front** **Back**	This frame contains the picture you have either uploaded from an existing picture or captured through a connected camera and subsequently marked as 'Primary'. Whatever size the picture appears here, the application will resize it to fit the badge frame specified in the Badge Designer.
Badge Template	Select an available badge template from the drop-down list. Only those badge templates previously defined by the system appear in this list. For more on creating badge templates, refer to *Badge Designer* on page 28.
Badge Back Photo	Select an available picture to place on the back of this card. Only those pictures previously captured or uploaded appear in this list. This field is not enabled unless the designated template allows both front and back design.
Create Badge	Click this button to print the badge to a designated badge printer.

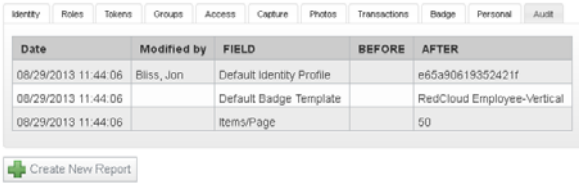
Save	Click this button once you've selected all of the groups you want to save your selections.
Cancel Changes	Click this button to ignore changes made during the present session and return to the previous page.

If no badge template has yet been created, a message like this appears: “No badge template found”.

To create a new badge, simply click the **Badge Designer** link and the Badge Template Listing page appears. Then create a badge template as required. For more information on this feature, see *Badge Designer* on page 28.

Audit Page

This page appears when you click the **Audit** tab. An example of the page is shown here:



This page enables the qualified operator to review changes that have been made to this page since it was first created.

Date	The date and time on which the change to this identity was made.
Modified by	The person who modified the identity.
FIELD	The field on the identity that was modified.
BEFORE	The date and time before this change took effect. If this cell is blank, it indicates that there was no previous value
AFTER	The date and time after this change took effect.
Create New Report	Click this button to create a PDF report of this page.

Badge Designer

The Badge Designer enables the qualified operator to design badge templates for inclusion in badge holder credentials.

The Designer consists of these features:

- User-defined field definitions
- Background color selection for both badge and components
- Photo frame placement
- Text placement
- Logo and insignia placement
- Double-sided badge support

To create a badge template:

1. From the **Setups** section on the home page, mouse over the **Settings** link.

   The available menu sub-options drop down.

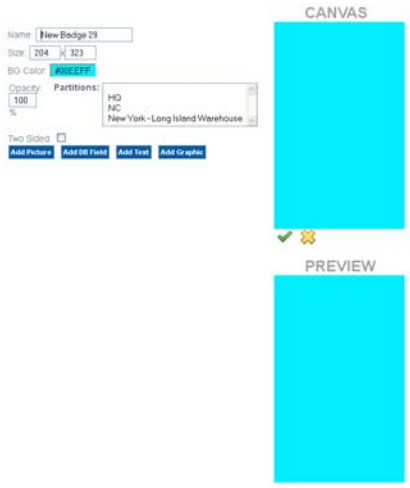
2. Select **Badge Designer**.

   The Badge Template Listing page appears.

3. Do one of these:

   - To copy an existing badge template, click the duplicate icon, , to the right of the badge template you want to copy. When the copy appears in the list, click on it.
   - To create a new badge template, click the Add New Badge Template button.

   The designated Badge Designer Add page appears like this example:



4. Enter a name for this badge template in the 'Name' field.
5. Specify the size of the badge you require in the 'Size' field.
6. Design the badge like this:

- To create or change the background for this template, select a background color and opacity for this badge template. For more on this, refer to *Changing the Badge Background* on page 31.
- To add one or more pictures, click the Add Picture button and add pictures to this badge template. For more on this, refer to *Adding Pictures* on page 32.
- To place database fields, click the Add DB Field button and place the required database fields on this template. For more on this, refer to *Adding Database Fields* on page 32.
- To place text, click the Add Text button and add text on this template. For more on this, refer to *Adding Text* on page 35.
- To add graphics, click the Add Graphic button and place one or more graphics on this template. For more on this, refer to *Adding Graphics* on page 36.

Make sure to save by clicking ✓ after each of these operations or your changes will not be reflected on the canvas. The badge preview pane appears below the canvas.

7. If you need to delete an existing element from the badge template, click the button to the right of the selected object.

   The deleted object remains on the canvas until you click ✓.

8. If you need to design a back side for this template, click Back Side and repeat Step 6 to design the obverse side of this badge.

   The back side will only print if you have a dual-side or duplex badge printer connected to this appliance.

9. When you're finished customizing this template, click ✓ once again.

   A message appears indicating the success of the badge template creation and you are returned to the Badge Template Listing page with the newly defined badge template in the list.

10. Click ✖ and you are returned to the Badge Template Listing page with the newly defined badge template in the list.

Expanding and Contracting Design Field Elements

When you have several design elements open at the same time, it can get crowded like this example:

To simplify your design space, click a design element word, like ‘Photo’ or ‘Data Field’, to contract the fields as shown below:

Changing the Badge Background

When you open a new badge template or edit an existing one, the canvas background like this example appears:

To change the background:

1. Click the **BG Color** box.

   The color palette appears.

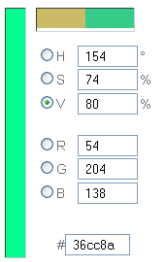
2. From the HSV or RGB color fields, enter the general color you require.

   All possible tints and variations of this color appear to the left in the tint area.

   The new color you have selected appears on the right side of the horizontal bar above the color element fields. The original color appears to the left.

3. To fine-tune the color, click within the tint area.

   A cross appears. Drag the cross through the area to determine the exact color you want. indicating the exact tint and shade you have selected like the following example:

   The number in the Color field changes to reflect your choice.

4. If required, slide up or down the vertical slide bar to change the color still further.
5. When you're finished with this palette, click **OK**.
6. When you are certain of your color, click ✔.

The canvas background changes and the preview pane appears with the changes reflected.

Adding Pictures

When you click **Add Picture**, an element entitled **Photo** is added to the Attributes list, like the following example:

Photo	Toggle this word to hide or reveal the fields in the attribute section below.
	Click this icon to delete the photo data and hide the fields associated with this for this object. The picture object remains on the canvas until you click the ✔ button.
Layer Order	Enter the number indicating the layer this graphic occupies on the badge, where 1 is the bottom layer, 2 is the next higher layer, and so on. For more on layer ordering, refer to “Layer Ordering” on page 37.
Location	Enter values to move the photo frame around on the canvas. As you change values, the photo rectangle will change positions on the work board.
Dimensions	Enter values to resize the photo frame, where the first value is the width and the second value is the height. As you change the values, the size of the rectangle will change to reflect it.
Rotation	Enter the value, in degrees, to rotate this object. The higher the number of degrees the farther clockwise the object will be rotated. Default is 0 degrees.
Maintain Aspect	Check this box to maintain the aspect ratio of the picture that appears in this frame. If this feature is left unchecked, the picture will simply fill the available frame space and skew the photo to match.

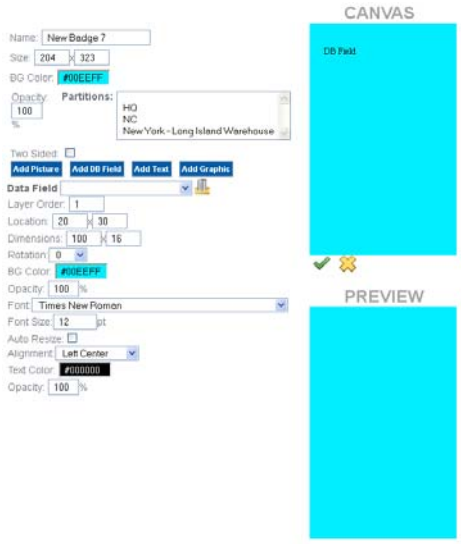
NOTE: None of the values entered here are reflected on the canvas until you have saved the screen by clicking ✔. Once saved, the preview pane displays the relevant image.

Adding Database Fields

Database fields are essentially placeholders for information that is supplied by the Identities database. These fields are populated by data supplied for the specific badge holder. For example, if you place a database field on this badge template that calls the Last Name data field, a badge

issued to William Smith assigned this badge template will automatically populate this field with the value 'Smith'. The same holds true for birth date, badge expiration, eye color, and many others.

When you click the **Add DB Field** button, a 'Data Field:' attribute is added to the Attributes list, like this example:

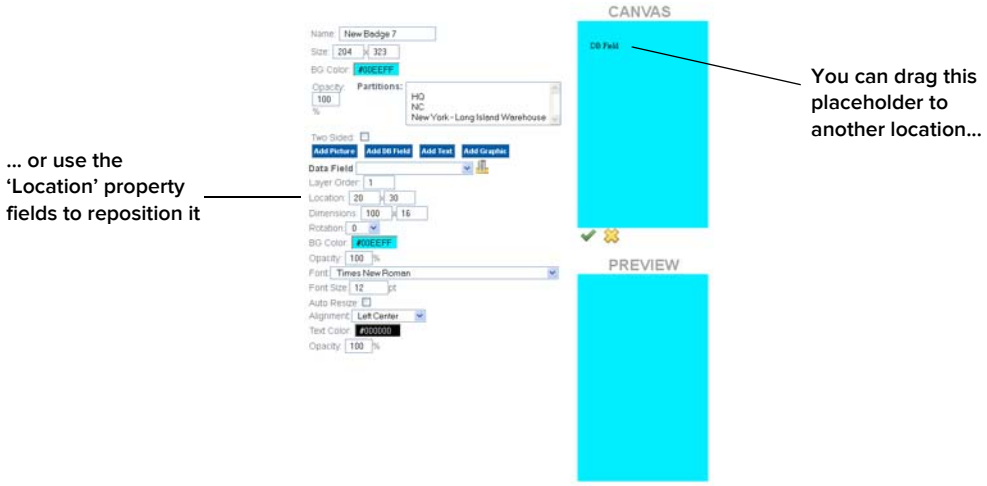


The fields on this page are described below:

Data Field	Select from a drop-down list the data field you want to include on this template. Only those data fields previously defined for this system appear in this list, including all user-defined data fields. When you click this field title, the attributes below appear. Toggle **Data Field** to hide or reveal current fields.
	Click this icon to delete the data and hide the fields associated with this for this object. The picture object remains on the canvas until you click the ✔ button.
Layer Order	Enter the number indicating the layer this graphic occupies on the badge, where 1 is the bottom layer, 2 is the next higher layer, and so on. For more on layer ordering, refer to *Layer Ordering* on page 37.
Location	Enter values to move the data field around on the work board. As you change values, the Data rectangle will change positions on the work board.
Dimensions	Enter values to resize the data field rectangle, where the first value is the width and the second value is the height. As you change the values, the size of the rectangle will change to reflect it.
Rotation	Enter the value, in degrees, to rotate this database object. The higher the number of degrees the farther clockwise the object will be rotated. Default is 0 degrees.
BG Color	Enter the color you require for the background of this DB field. When you click on this field, a color palette appears. Select the general color, then fine tune it as required. Each change you make to the color is reflected on the work space.
Font	Select from the drop-down list the font you want used for the text in this data field.
Font size	Select from the drop-down list the font size you want used for the text in this data field.

Alignment	Select the alignment you require for this data field.
Text Color	Enter the color you require for the text used in this DB field. When you click on this field, a color palette appears. Select the general color, then fine tune it with the slider as required. Each change you make to the text color is reflected on the work space.
Opacity	In the text box, enter the percentage of opacity you want for the selected text color. The lower the number, the fainter the color that appears.

When you select a Data Field option, the placeholder for that option appears on the canvas as shown in the following example.

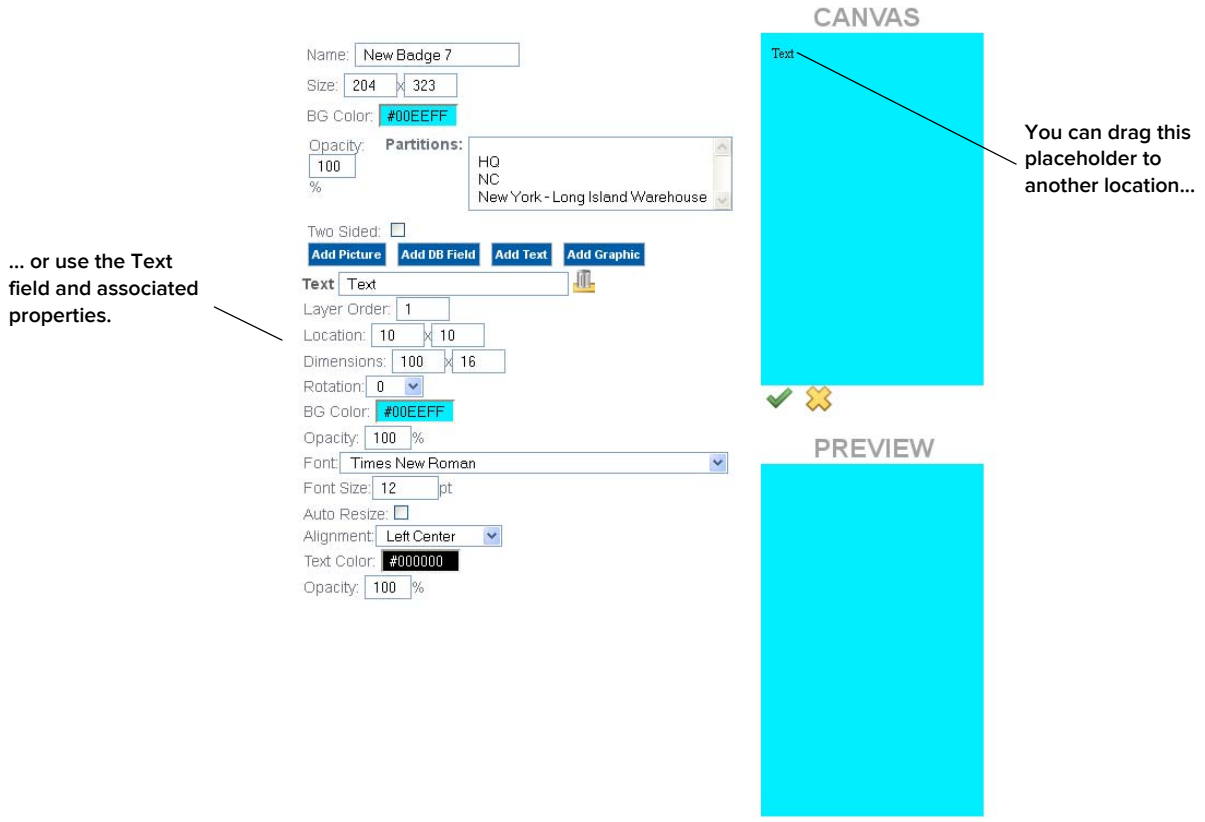

CANVAS
DB Field
You can drag this placeholder to another location...
... or use the 'Location' property fields to reposition it
PREVIEW

Use your mouse to drag this placeholder to another location on the canvas, or use the Location options in the attributes list to relocate it.

NOTE: None of the values entered here are reflected on the canvas until you have saved the screen by clicking ✔. The Preview pane appears with the new data field reflected.

Adding Text

When you click the Add Text button, a Text field appears, like this example:



Notice that a text placeholder appears on the canvas. Use your mouse to drag this text placeholder to the required position on the canvas, or alternatively fine-tune the position using the Location field.

The fields in this section are described below:

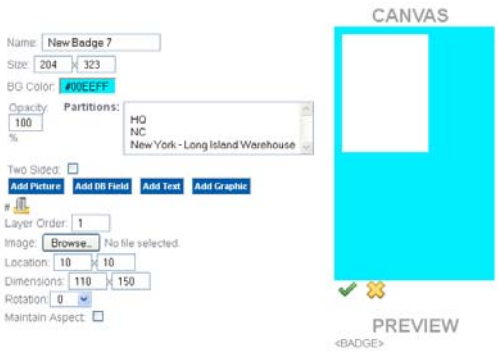
Text	Enter the text you want to appear on this template. Toggle **Text** to hide or reveal current fields.
	Click this icon to delete and hide the current text object fields. The picture object remains on the canvas until you click the button.
Layer Order	Enter the number indicating the layer this graphic occupies on the badge, where 1 is the bottom layer, 2 is the next higher layer, and so on. For more on layer ordering, refer to *Layer Ordering* on page 37.
Location	Enter values to move the text field around on the work board. As you change values, the text rectangle will change positions on the work board.
Dimensions	Enter values to resize the text field rectangle, where the first value is the width and the second value is the height. As you change the values, the size of the rectangle will change to reflect it.

Rotation	Enter the value, in degrees, to rotate this object. The higher the number of degrees the farther clockwise the object will be rotated. Default is 0 degrees.
BG Color	Enter the color you require for the background of this text field. When you click on this field, a color palette appears. Select the general color, then fine tune it as required. Each change you make to the text background color is reflected on the canvas only after you have saved it.
Font	Select from the drop-down list the font you want used for the text in this field.
Font size	Select from the drop-down list the font size you want used for the text in this field.
Alignment	Select the alignment you require for this field.
Text Color	Enter the color you require for the text used in this field. When you click on this field, a color palette appears. Select the general color, then fine tune it as required. Each change you make to the text color is reflected on the canvas only after you have saved it.
Opacity	In the text box, enter the percentage of opacity you want for the selected text color. The lower the number, the fainter the color that appears.

NOTE: None of the values entered here are reflected on the canvas until you have saved the screen by clicking ✔. The Preview pane appears with the new data field reflected.

Adding Graphics

When you click **Add Graphic** , a graphic property appears under the Attributes column like the following example:



Notice that a graphic placeholder appears on the canvas. Use you mouse to drag this placeholder to another location on the canvas, or use the Location options in the attributes list to relocate it.

The fields in the attributes list include:

	Click this icon to delete and hide the current graphic object fields. The picture object remains on the canvas until you click the ✔ button.
Layer Order	Enter the number indicating the layer this graphic occupies on the badge, where 1 is the bottom layer, 2 is the next higher layer, and so on. For more on layer ordering, refer to *Layer Ordering* on page 37.

Image	Either enter the path and file name for the image you want to appear here, or click the Browse... button to locate and identify the image file you want to use. The image you need must be copied to an accessible directory before you can browse for it.
Location	Enter values to move the image around on the work board. As you change values, the placeholder will change positions on the canvas. You can also use these fields to fine tune the location of the graphic on this badge template.
Dimensions	Enter values to resize the graphic rectangle, where the first value is the width and the second value is the height. As you change the values, the size of the rectangle will change to reflect it.
Rotation	Enter the value, in degrees, to rotate this object. The higher the number of degrees the farther clockwise the object will be rotated. Default is **0** degrees.
Maintain Aspect	Click to check this box designating that resizing this graphic will not change the aspect ratio of the image. Using this feature you can avoid distorting the image.

NOTE: None of the values entered here are reflected on the canvas until you have saved the screen by clicking ✔. The Preview pane appears with the new data field reflected.

Layer Ordering

Many badges are designed so that two or objects can be superimposed on each other.

For example, you can place an employee photo on a badge with text, such as Administration, written across it. This can result in a jumble of objects without any design sense.

To alleviate this problem, the Badge Designer provides the Layer Order field. This assigns a layer value to a specific object and indicates which object should be placed at the front, which one should be moved to the back, and which ones should be in between.

A simple numerical value indicates the layer order:

1	Bottom-most layer
2	Layer above Layer 1
3	Layer above Layer 2
...	Each increment specifies a layer above.

For example, if you need to have a logo superimposed on the upper left corner on the employee photo with a box of different color behind the photo, you could do this:

1. Create a filled box in a graphic program, save it as a jpg file, then import it into Badge Designer. Specify the layer as 1, meaning the lowest layer.
2. Add a picture to this badge template. Place it so that it is offsetting the filled box. Specify the layer it occupies as 2, the layer just above layer 1.
3. Import a jpg logo into Badge Designer. Place it in the upper left corner of the picture. Specify the layer as 3, the layer above layer 2.

The resulting template will look something like this example:

Notice that the canvas shows the objects as they were added, while the preview window shows the objects as assigned in the Layer Order field.

Identity Profiles

Defining an identity can take a long time. The identity page alone contains more than 25 fields. Assigning attributes to that identity, such as roles, groups, tokens, and badge templates adds still more time. Identity profiles provide a shortcut that can speed up the process.

Identity profiles are pre-defined templates that can be assigned to an individual identity. Once assigned, the field values assigned in the profile are used to populate the same fields for the individual identity.

Simply create an Identity Profile then impose that profile on one or more identities through either the batch update feature in Groups or Identities add feature.

Adding Identity Profiles

To add an Identity Profile:

1. From the icon task bar on the home page, click **Identities**.

   The Identities Listing page appears.

2. From the sub-menu, select

.

   The Identity Profiles Listing page appears. If no profiles are currently defined, no profiles appear in the list.

3. Click the

button.

   The Identity Profile Add page appears.

4. Fill out the required fields on the Identity page.

5. When you're finished, click

.

   The Properties screen for this identity profile appears.

6. Add values to the following pages as required:

   - Identity Page
   - Roles Page
   - Tokens Page
   - Groups Page
   - Access Page

7. When you're finished adding features to this identity profile, click

again.

   The Identity Profiles Listing page appears.

8. Assign one or more groups to this identity profile as required.

9. Schedule this identity for updating, if required.

Editing Identity Profiles

To edit an existing Identity Profile:

1. From the icon task bar on the home page, click **Identities**.

   The Identities Listing page appears.

2. From the sub-menu, select Profiles.

   The Identity Profiles Listing page appears. All existing profiles appear in the list.

3. Click the name of the profile you want to edit.

   The Identity Profile properties screen for that profile appears.

4. Fill out the required fields on the Identity page.

5. Make changes to the pages as required. These pages include:

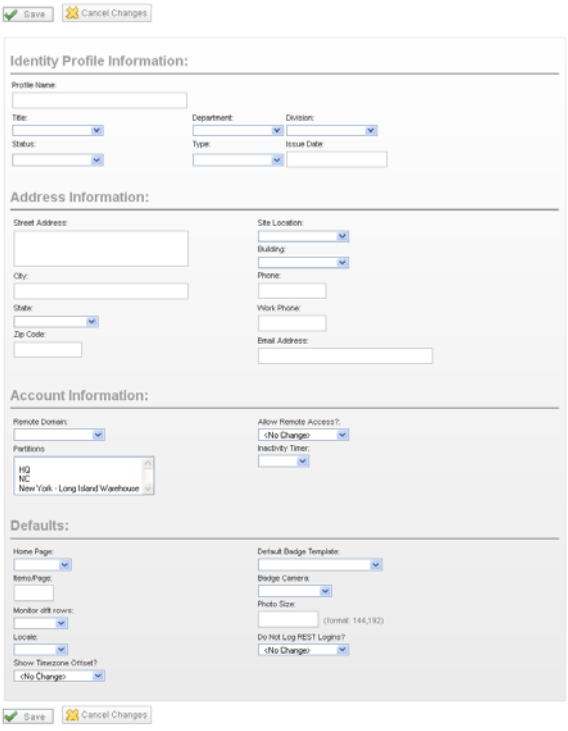
   - Identity Page
   - Roles Page
   - Tokens Page
   - Groups Page
   - Access Page

6. When you're finished adding features to this identity profile, click Save.

   The Identity Profiles Listing page appears.

Identity Profiles Add Page

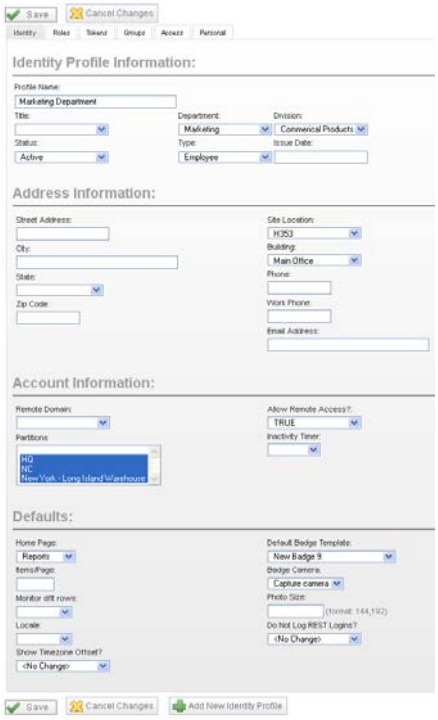
When you click the Add New Identity Profile button, a screen like this appears:



For the descriptions of the fields and buttons on this page, refer to *Identity Profiles - Identity Page* on page 43.

Identity Profiles Property Screen

When you click the name of an existing profile from the profile listing page, a screen like this appears:



This screen contains the following pages:

- Identity Page
- Roles Page
- Tokens Page
- Groups Page
- Access Page

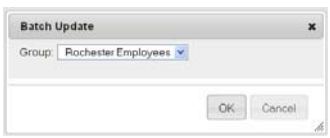
For a full description of these pages refer to *Identity Profiles Pages Field Descriptions* on page 43.

Identity Profiles - Assigning Groups

To assign one group at a time to a specific identity profile:

1. At the Identity Profiles Listing page, click the ✔ button from the 'Batch Update' column of the designated identity profile.

   A prompt like this example appears:

2. From the 'Group' pick list, select the group you want to designate for batch updating.

   Only those groups currently defined for this system appear in this list.

3. Click **OK**.

   The specified group is assigned to the designated identity profile and all fields and values associated with the profile are assigned to every member of the group.

4. Repeat Steps 1 - 3 to assign more groups to this identity profile.

All members of the selected group are updated to include the fields and values specified in this profile.

To assign more than one group and set up limits:

1. From the Identity Profiles Listing page, select the profile you want.

   The properties screen for that profile appear.

2. Click the **Groups** tab.

   The Groups page appears.

3. Click to highlight one or more groups that you want in the 'Available' window then click the ▶ button to move groups to the 'Members' window. Do this for each of the window sections you require. This includes these:

   - **Assign Equal**: Use these windows to assign the specified groups to any identity that is a member of this profile and enable the operator to assign a value in order to customize the role for each identity.
   - **Add**: Use these windows to assign the specified groups to any identity that is a member of this profile and require specific values that cannot be customized.
   - **Remove**: Use these windows to remove the specified groups from any identity that is a member of this profile.

4. When you're finished, click Save.

Identity Profiles - Assigning Roles

To assign roles to an identity profile:

1. At the extended Identity Roles property screen, click on the **Roles** tab.

   The Roles page appears.

2. If needed, for each window you need to change, enter the search criterion in the 'Search' box and click Filter.

   The specified 'Available' window is populated with the roles fitting the search criterion. The search filter fields only appear if there are more roles defined for this system than can fit within the 'Available' window.

3. Click to highlight one or more roles that you want in the 'Available' window then click the ▶ button to move roles to the 'Members' window. Do this for each of the window sections you require. This includes these:

   - **Assign Equal**: Use these windows to assign the specified roles to any identity that is a member of this profile and enable the operator to assign a value in order to customize the role for each identity.

- **Add**: Use these windows to assign the specified roles to any identity that is a member of this profile and require specific values that cannot be customized.
- **Remove**: Use these windows to remove the specified roles from any identity that is a member of this profile.

4. When you're finished, click Save.

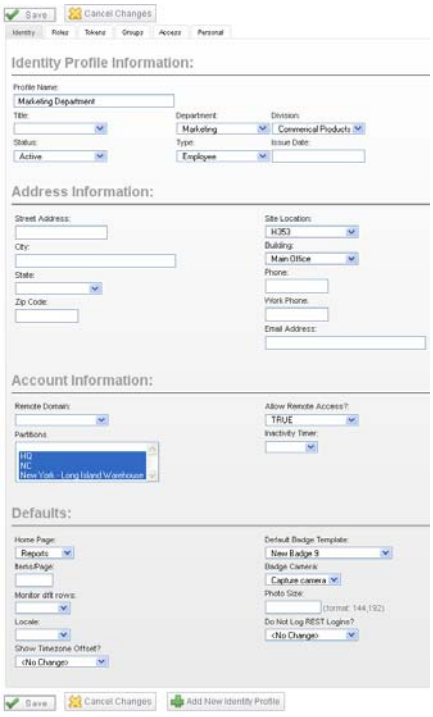
Identity Profiles Pages Field Descriptions

This section defines the fields and buttons that appear on each Identity page. These pages include:

- Identity (page 43)
- Roles (page 46)
- Tokens (page 47)
- Groups (page 48)
- Access (page 50)

Identity Profiles - Identity Page

When you bring up the Identity Profile properties screen or click the **Identity** tab for an existing profile, a page like this appears:



The fields and buttons on this page include:

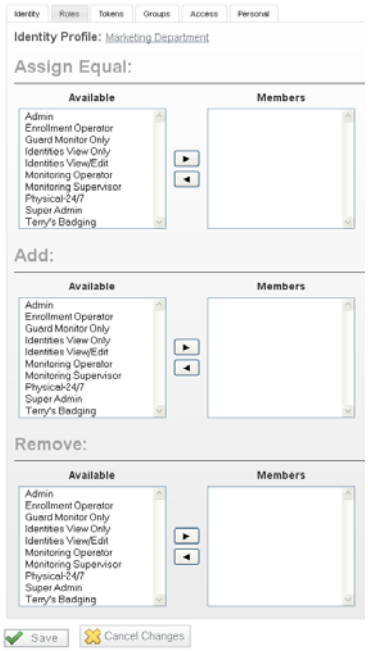
Identity Profile Information:	
Profile Name	Enter the name of the identity profile you are creating. This field is required.

Title	From the drop-down list, select the title of this profile. To define more options, refer to “User-Defined Lists - Adding Items” in the on-line help or the *Workflow User Guide*.
Department	From the drop-down list, select the department to which this profile is affiliated. To define more options, refer to “User-Defined Lists - Adding Items” in the on-line help or the *Workflow User Guide*.
Division	From the drop-down list, select the company division with which this profile is affiliated.
Status	Select the option from the pick list that describes the current status of this new profile. The options include: **Active** - this profile is currently active. **Inactive** - this profile is currently inactive. This field is required.
Type	From the drop-down list, select the type of identity this is. Values include <Blank>, **Employee**, **Contractor**, and **Visitor**. To define more options, refer to “User-Defined Lists - Adding Items” in the on-line help or the *Workflow User Guide*.
Issue Date	Specify the date this profile was issued. Click the field to bring up the calendar and specify the date on which this profile is issued.
Address Information	
Street Address	Enter the street address where this profile lives.
City	Enter the city where this profile lives.
State	Enter the state where the profile lives.
Zip Code	Enter the zip code where the profile lives.
Site Location	From the drop-down list, select the location where this profile works. To define more options, refer to “User-Defined Lists - Adding Items” in the on-line help or the *Workflow User Guide*.
Building	From the drop-down list, select the building where this profile works. To define more options, refer to “User-Defined Lists - Adding Items” in the on-line help or the *Workflow User Guide*.
Phone	Enter the phone number this profile has. This can be either cell phone or home phone.
Work Phone	Enter the phone number where this profile works.
Email Address	Enter the profile's email address.
Account Information	
Remote Authentication?	Check this box to indicate that this identity can access this system remotely. The password and confirm fields disappear. Remote authenticate is achieved by defining a default domain and server from the Remote Authentication page.
Remote Domain	From the drop-down list, select an external domain (a domain outside this security system) from which this identity can seek authentication. Only those external domain previously defined by the system appear in this list.

Allow Remote Access?	Check this box to allow a specific identity remote access to the Postgres (transaction) database.
Inactivity Timer	From the drop-down list, enter the number of minutes this user's activities can remain unrecorded before the user is logged out of the application.
Partitions	Select one or more partitions from the list. Only those selected partitions can access this page. Only those partitions previously defined for this system appear in this window.
Defaults	
Home Page	From the drop-down list, select the page members of this profile view as their home page when they log into Access Control Manager.
Items/Page	Enter the number of list items returned, by default, members of this profile are allowed for each page. The default is 25 items per page.
Monitor dflt rows	From the drop-down list, select the number of rows members of this profile view when they view the Monitor feature.
Locale	From the drop-down list, select the language and variant members of this profile use. Currently, there are three selections: <BLANK>, ENGLISH-UK, or ENGLISH-US.
Show Time zone Offset?	Select whether there is an offset employed for time zones. Possible selections are: No Change, TRUE, or FALSE.
Default Badge Template	From the drop-down list, select the badge template members of this profile utilize to create a badge. Only those badge templates currently defined for this system appear in the option list.
Badge Camera	Select from the available list the camera members of this profile use to capture images for this system. Only those devices previously installed and configured for this computer or network appear in the drop-down window.
Photo Size	Enter the format size you want for photos captured with the camera specified above. This size is in picas with the length and width separated by a comma (no spaces required).
Do Not Log REST Command	From the drop-down option list, select whether to prohibit logging of all REST commands (TRUE) or not (FALSE) for members of this profile.
	Click this button to save the current settings.
	Click this button to exit this page and return to the higher level screen.
	Click this button to add a new identity profile. The Add New Profile page appears.

Identity Profiles - Roles Page

When you click the **Roles** tab from the properties screen, a page like this appears:



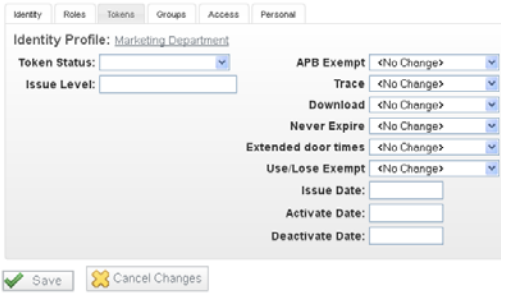
This page includes the following fields:

Assign Equal	Use these windows to assign the specified roles to any identity that is a member of this profile and enable the operator to assign a value in order to customize the role for each identity.
Available	This window contains the available roles defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the Members window, click to highlight one or more terms then click the ► button.
Members	This window contains all roles that are associated with this identity. To add a role to this window, select to highlight one or more terms from the Available window then click the ► button. To remove a term from this window, select to highlight the term then click the ◄ button.
Add	Use these windows to assign the specified roles to any identity that is a member of this profile and require specific values that cannot be customized.
Available	This window contains the available roles defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the Members window, click to highlight one or more terms then click the ► button.

Members	This window contains all roles that are associated with this identity. To add a role to this window, select to highlight one or more terms from the Available window then click the ► button. To remove a term from this window, select to highlight the term then click the ◄ button.
Remove	Use these windows to remove the specified roles from any identity that is a member of this profile.
Available	This window contains the available roles defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the Members window, click to highlight one or more terms then click the ► button.
Members	This window contains all roles that are associated with this identity. To add a role to this window, select to highlight one or more terms from the Available window then click the ► button. To remove a term from this window, select to highlight the term then click the ◄ button.
Save	Click this button once you've selected all of the roles you want to save your selections.
Cancel Changes	Click this button to ignore changes made to this page and return to the Identities Profiles Listing page.

Identity Profiles - Tokens Page

When you click the **Tokens** tab from the properties screen, a page like this example appears:



Use this page to limit the tokens that are later added to an identity once it is associated with this profile. Only those tokens that meet the qualifications set on this page can be added to this identity.

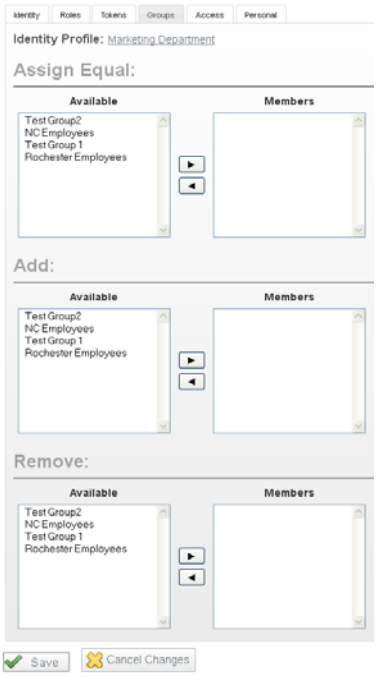
The fields and buttons on this page include:

Token Status	From the pick list, select the current status option of the token assigned to this profile.
Issue Level	Enter the issue level this token possesses. The range is 0 to 9 where 0 is no issue level and 9 is the highest possible issue level.
APB Exempt	Select <No Change>, **TRUE**, or **FALSE** to designate that this token is exempted from the use of anti-passback at doors or access points where APB is normally enforced. This is generally used for executive override.

Trace	Select <No Change>, **TRUE**, or **FALSE** to enable the trace event feature for this token. When checked, the trace enabled token will generate a special trace event each time it is presented at a card reader. The event can then be sent to monitoring, reported separately, and used in global I/O configurations.
Download	Select <No Change>, **TRUE**, or **FALSE** to enable downloading of this token. This feature is checked and enabled by default.
Never Expire	Select <No Change>, **TRUE**, or **FALSE** to indicate that this token never expires.
Extended door times	Select <No Change>, **TRUE**, or **FALSE** to indicate that this token can use extended door times. This is particularly useful for token holders with special needs.
Issue Date	Click inside this field and use the calendar to specify the date when this token is issued. Alternatively, enter the date using the keyboard.
Activate Date	Click inside this field and use the calendar to specify the date when this token is activated. Alternatively, enter the date using the keyboard.
Deactivate Date	Click inside this field and use the calendar to specify the date when this token is deactivated. Alternatively, enter the date using the keyboard.
Save	Click this button once you've finished to save your selections.
Cancel Changes	Click this button to ignore unsaved changes made to this page and return to the Identities Listing page.

Identity Profiles - Groups Page

When you click the **Groups** tab from the Identity Profiles properties screen, a page like this example appears:

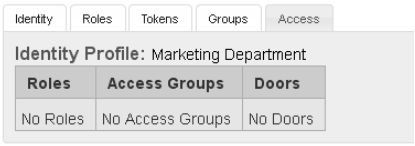


The fields and buttons on this page include:

Assign Equal:	Use these windows to assign the specified groups to any identity that is a member of this profile and enable the operator to assign a value to that group in order to customize the role for each identity.
Available	This window contains the available policy groups defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the 'Members' window, click to highlight a term then click the ► button.
Members	This window contains all policy groups that are associated with this identity. To add a group to this window, select to highlight a term from the 'Available' window then click the ► button. To remove a term from this window, select to highlight the term then click ◄ the button.
Add:	Use these windows to assign the specified groups to any identity that is a member of this profile and require specific values that cannot be customized.
Available	This window contains the available policy groups defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the 'Members' window, click to highlight a term then click the ► button.
Members	This window contains all policy groups that are associated with this identity. To add a group to this window, select to highlight a term from the 'Available' window then click the ► button. To remove a term from this window, select to highlight the term then click the ◄ button.
Remove:	Use these windows to remove the specified groups from any identity that is a member of this profile.
Available	This window contains the available policy groups defined by the system. If you have used the search text, this window contains all the policies that fit the search criterion. To move terms from this window to the 'Members' window, click to highlight a term then click the ► button.
Members	This window contains all policy groups that are associated with this identity. To add a group to this window, select to highlight a term from the 'Available' window then click the ► button. To remove a term from this window, select to highlight the term then click the ◄ button.
Save	Click this button once you've selected all of the groups you want to save your selections.
Cancel Changes	Click this button to ignore changes made during the present session and return to the previous page.

Identity Profiles - Access Page

When you click the **Access** tab from the Identity Profiles properties screen, a page like this example appears:



The fields on this page are:

Identity Profile	The name of the currently selected profile.
Roles	A list of all roles with which this profile is currently associated.
Access Groups	A list of all access groups with which this profile is currently associated.
Doors	A list of all doors with which this profile is currently associated and can access.

External Surveillance Cameras

Access Control Manager enables the qualified operator to configure several types of external surveillance systems for use by Access Control Manager. These systems includes cameras and video equipment, as well as various types of servers to manage these devices and sensors. The external systems presently supported include:

- IP-based system including many image capture devices (network-based cameras and video equipment)
- Exacq surveillance systems
- Pelco surveillance systems
- LifeSafety power supply monitoring systems
- Avigilon high-definition surveillance systems
- Salient server systems
- Milestone server systems

NOTE: Before the Access Control Manager can use the device, it must first be connected to a LAN that is accessible to the Access Control Manager appliance.

To access and use this feature:

1. At the Setup links section of the home page, mouse-over **Settings**.

   A pull-down option list appears.

2. From the available sub-options, select External Systems.

   The IP Cameras listing page appears.

3. To add/edit a specific external system:

   - For IP-based camera, click the **IP Based** tab to bring up the IP Camera Listing Page
   - For Exacq servers, click the **Exacq** tab to bring up the Exacq listing page
   - For Pelco servers, click the **Pelco** tab to bring up the Pelco listing page
   - For the LifeSafety power supply monitor systems, click the **LifeSafety** tab to bring up the LifeSafety listing page.
   - For the Avigilon HD surveillance system, click the **Avigilon** tab to bring up the Avigilon listing page.
   - For the Salient surveillance system, click the **Salient** tab to bring up the Salient listing page.
   - For the Milestone surveillance system, click the **Milestone** tab to bring up the Milestone listing page.

Adding Image or Video Devices

In order to capture photos for individuals entered in the Identities database or record video for surveillance, you must first define a device for this purpose.

NOTE: Before you can add a camera or video device, you must first connect a supported device to your network or server, then configure the device as described in your device user's guide. Make sure to write down the camera's IP address and onboard URL.

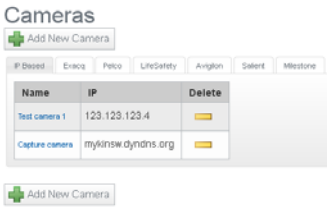
To add an image capture or video recording device to this system:

1. At the Setup links section of the home page, mouse-over Settings.

   A pull-down option list appears.

2. From the available sub-options, select **External Systems**.

   The Cameras listing page appears like this example:



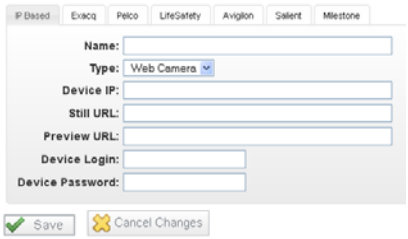
3. Select one of the currently available device types:

   - For an IP-based camera, go to step 4.
   - For an Exacq server, click the **Exacq** tab and the Exacq Servers listing page appears.
   - For a Pelco server, click the **Pelco** tab and the Pelco Server listing page appears.
   - For a LifeSafety power supply, click the **LifeSafety** tab and the LifeSafety power listing page appears.
   - For an Avigilon server, click the **Avigilon** tab and the Avigilon server listing page appears.
   - For the Salient surveillance system, click the **Salient** tab to bring up the Salient listing page.
   - For the Milestone surveillance system, click the **Milestone** tab to bring up the Milestone listing page.

4. From the appropriate listing page, click the **Add**... button relevant to that device (for the IP-based camera, the button would be

) or click the name of an existing device.

   The appropriate Add page appears like this example:



5. Enter values as required.

   This page includes these fields and buttons:

IP Based Camera	
Name	Enter the name of this device. Pick a name that will help identify the camera.

Type	From the pick list, select the type of image device this is. You can select from: **Web Camera** - This is a network-attached camera. **RTSP** - The Real Time Streaming Protocol is a network control protocol designed for use in entertainment and communications systems.
Device IP	Enter the IP address for this device.
Still URL	Enter the URL or web address, if required, of this camera's web-based application showing the still picture this camera is currently framing.
Preview URL	Enter the URL or web address, if required, of this camera's web-based application showing a preview of the finished picture.
Device Login	Enter the login name that will enable access to this device. Many cameras accessed over the network require security to use. The Access Control Manager's device login is supplied by default.
Device Password	Enter the password that will enable access to this device. Many cameras accessed over the network require security to use. The Access Control Manager's device password is supplied by default.
Exacq Server	
Appliance	From the drop-down list, select the appliance to which this server is connected or with which it is configured. Only those servers previously defined for this system can appear in this list.
Address	Enter the URL or IP address of this server. All servers have a fixed address that must be entered here.
Port	Enter the appliance port to which this server is connected.
Username	If required, enter the user name used to access this server. This user name is automatically entered whenever the server is accessed.
Password	If required, enter the password used to access this server. This password is automatically entered whenever the server is accessed.
Motion Smoothing	From the drop-down list, enter the interval in seconds the appliance uses to judge aberrations in the motion of the video. This eliminates expected motion in the video, like a flickering panel or background motion, and concentrates on that motion which is unexpected and therefore suspicious.
Pass Through Enabled	Check this box to indicate that pass through is enabled for the input connected to this server.
Installed	Check this box to indicate that this server is installed and communicating properly with the Access Control Manager appliance.
Pelco Server	
Name	The existing name of this video server.

Alt Name	The alternative name for this video server.
Appliance	From the drop-down list, select the appliance to which this server is connected or with which it is configured. Only those servers previously defined for this system can appear in this list.
Address	Enter the URL or IP address of this Pelco server. All Pelco servers have a fixed address (assigned when this server was configured) that must be entered here.
File to Upload	Either enter the name of the file required to run this server or click the browse button and find the required file.
Username	If required, enter the user name used to access this server. This user name is automatically entered whenever the server is accessed.
Password	If required, enter the password used to access this server. This password is automatically entered whenever the server is accessed.
Installed	Check this box to indicate that this server is installed and communicating properly with the Access Control Manager appliance.
Cameras	A list of cameras connected to and supported by this server.
LifeSafety Power	
Name	The names of the power supplies for this system.
Alt Name	The alternative name for this component, usually a descriptive name.
Appliance	From the drop-down list, select the appliance to which this power supply is connected.
Address	Enter the web address defined for this power supply.
Username	Enter the user name that enables the appliance access to this component.
Password	Enter the password that enables the appliance access to this component.
Installed	Check this box to indicate that this component is connected to the appliance and working properly.
Cameras	A list of cameras connected to and supported by this server.
Avigilon Server	
Name	The names of the video recording devices for this system.
Alt Name	The alternative name for this server.
Appliance	From the pick list, select the appliance this server is connected to.
Address	The web address defined for this video recording device. Click on this address to bring up the Avigilon Server Edit page for this device.

Port	The Avigilon server port through which the Access Control Manager appliance is communicating.
Remote Username	The name the user enters in order to gain access to the remote server.
Remote Password	The password the user enters in order to gain access to the remote server.
Local Username	The name the user enters in order to gain access to the local server.
Local Password	The password the user enters in order to gain access to the local server.
Installed	Check this box to indicate that this server is connected and working properly.
Cameras	The name and UUID of each camera this server accesses, their current status, whether they are PTZ or not, and their zoom capability.
Salient Server	
Name	The names of the video server for this system.
Alt Name	The alternative name for this server.
Appliance	From the drop-down list, select the appliance to which this server is connected or with which it is configured. Only those servers previously defined for this system can appear in this list.
Hostname	Enter the network name, URL, or IP address of this Salient server. All Salient servers have a fixed address (assigned when this server was configured) that must be entered here.
Port	Enter the port number to which this server is connected on the appliance.
WebServicePort	Enter the port number that this server uses to communicate with its web service.
Username	If required, enter the user name used to access this server. This user name is automatically entered whenever the server is accessed.
Password	If required, enter the password used to access this server. This password is automatically entered whenever the server is accessed.
VidProxyUrl	The URL used as a translator between the appliance and the server.
Installed	Check this box to indicate that this server is connected and working properly.
Milestone Server	
Name	The names of the video recording devices for this system.
Alt Name	The alternative name for this server.

Appliance	From the pick list, select the appliance this server is connected to.
Address	The web address defined for this video recording device. Click on this address to bring up the Milestone Server Edit page for this device.
Port	Enter the Milestone server port through which the Access Control Manager appliance is communicating.
Username	The name the user enters in order to gain access to this server.
Password	The password the user enters in order to gain access to this server.
VidProxyUrl	The URL used as a translator between the appliance and the server.
VidProxyImageUrl	The URL used to store the video captured by the Milestone server.
Installed	Check this box to indicate that this server is connected and working properly.

6. Click

to save these change. The new device appears on the listing page.